



FHA Catalyst: **Mortgagee** **Administrator** **Role**

User Guide

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1. Overview - *FHA Catalyst*: Mortgagee Administrator Role

The Mortgagee Administrator Role is a new role for Mortgagees to onboard and manage all users in their institution in *FHA Catalyst*, the web-based system for the Federal Housing Administration (FHA). Once the Mortgagee Administrator Role has been granted to a user, these Mortgagee Administrators can onboard, manage, freeze/unfreeze, and disable/deactivate all users in their institution.

This guide explains how to use the Mortgagee Administrator Role. Please refer to the Single Family Housing Policy Handbook 4000.1 for in-depth information on FHA policy, event definitions, reporting timeframes, data elements, and post-audit requirements.

1.1 Navigating the *FHA Catalyst*: Mortgagee Administrator Role User Guide

The table of contents for this guide is both searchable and linked. Selecting any of the chapter titles or subheadings will take users directly to the associated section. Users can navigate back to the table of contents by scrolling back to the start of the guide or using the [return to table of contents](#) links at the end of each section.

This guide features step-by-step instructions. Numbered lists, bullets, and screenshots are used to give the step-by-step instructions for completing tasks in *FHA Catalyst*.

Step-by-Step Instructions

1. Instructions describing how to complete tasks appear in lists.
2. Words that point to **links** or **boxes** that the user needs to select will appear in **bold**.
3. These instructions will describe how to complete processes using screenshots.
4. The screenshot may also include boxes, lines, and labels that show which part of the page is important.

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2. Getting Started

This section defines the basic functionalities of *FHA Catalyst* as well as specific terminology to help Mortgagees navigate the system and describes how Mortgagees onboard and manage users using the Mortgagee Administrator Role.

2.1 Access Information

FHA-approved Mortgagees must designate a Mortgagee Administrator for their institution to manage user access for FHA Catalyst modules. To add or terminate a Mortgagee Administrator, mortgagees must download the “**FHA Catalyst User Access Request Form**” on the [FHA Catalyst website](#) and send it to the FHA Resource Center at answers@hud.gov.

A prerequisite to becoming a Mortgagee Administrator in FHA Catalyst is that the user is a current FHA Connection (FHAC) Application Coordinator. If the user is not an FHAC Application Coordinator, the user must request access via FHAC prior to requesting access for FHA Catalyst. Upon verification of the FHAC Application Coordinator role, then HUD will grant the user FHA Catalyst Mortgagee Administrator access.

2.2 FHA Catalyst Landing Page

Once the Mortgagee Administrator role has been granted, the Mortgagee Administrator will be able to view and select **Account Management** on the dropdown list under their **Username** on the *FHA Catalyst* Landing Page. The option will take the Mortgagee to the Institution Users Page, where all users in their organization are displayed.

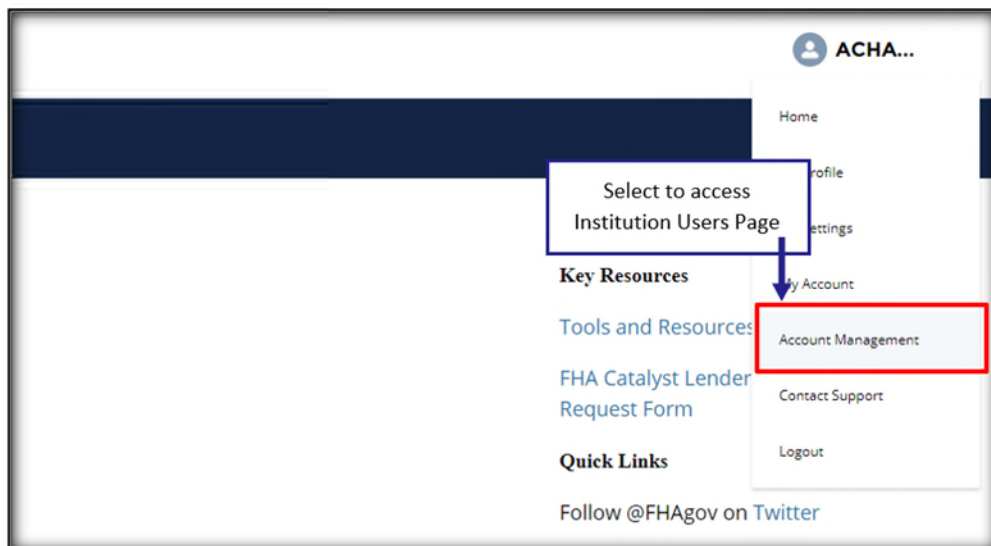


Figure 1: FHA Catalyst Landing Page

1. The *FHA Catalyst* Landing Page contains the follow items:
 - The **Username** is displayed on the top right of the screen. Users can view their profile and logout when selecting their Username.
 - The **Module** logo is displayed on the center of the page where users will need to select to access the Application. Please note that Module access is provided to Mortgagees based on what they are currently using in *FHA Catalyst*.
 - **Key Resources** are provided on the right of the page where users can access additional resources.
 - **Quick Links** are provided on the right of the page where users can access FHA social media and send any questions or comments to the FHA Resource Center.
2. Select on the **Account Management** to access the Institution Users Page.

2.3 Institution Users Page

The Institution Users Page displays a list view of all users previously onboarded by the Mortgagee Administrator. It allows for Mortgagee Administrator to onboard new users in the institution.

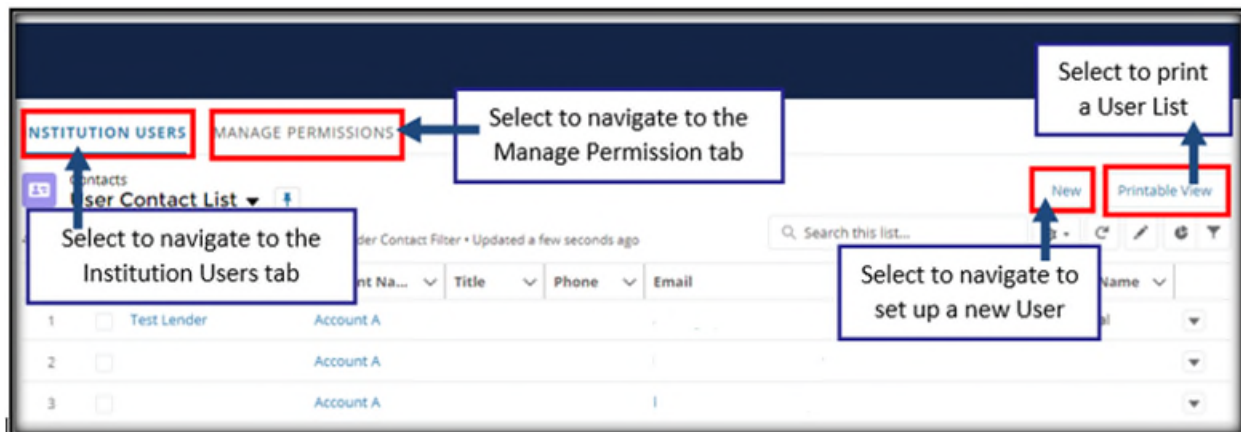


Figure 2: Institution Users Page

1. The **Institution Users tab** displays all Users uploaded by the Mortgagee Administrator.
2. The **Manage Permission tab** allows the Mortgagee Administrator to assign module access for users in the institution.
3. The **New** button allows the Mortgagee Administrator to create a new User Contact in the institution.
4. The **Printable View** button allows the Mortgagee Administrator to run a report of all users in the institution.
5. The **List View** provides the Mortgagee Administrator with the ability to view their recently reviewed Users records.
 - To update your filter criteria, select the Dropdown icon. Then select the desired view (Figure 3 below).
 - To set a specific view as the default view every time you navigate to this page, select the Pin icon (Figure 3 below).
 - Select "All Contacts" to view all Users onboarded by the Mortgagee Administrator.

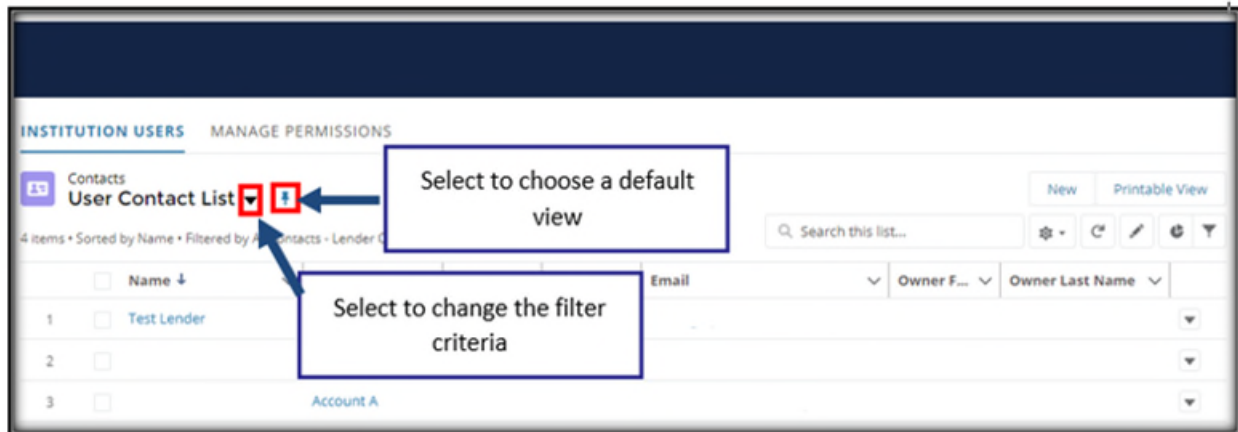


Figure 3: Filter and Pin

6. **To search for a specific User:** enter at least two letters in the search bar and hit **Enter** to search.
 - o Note: to clear a search and return to the full list view, select the “x” icon in the search bar or delete the entry and press Enter.

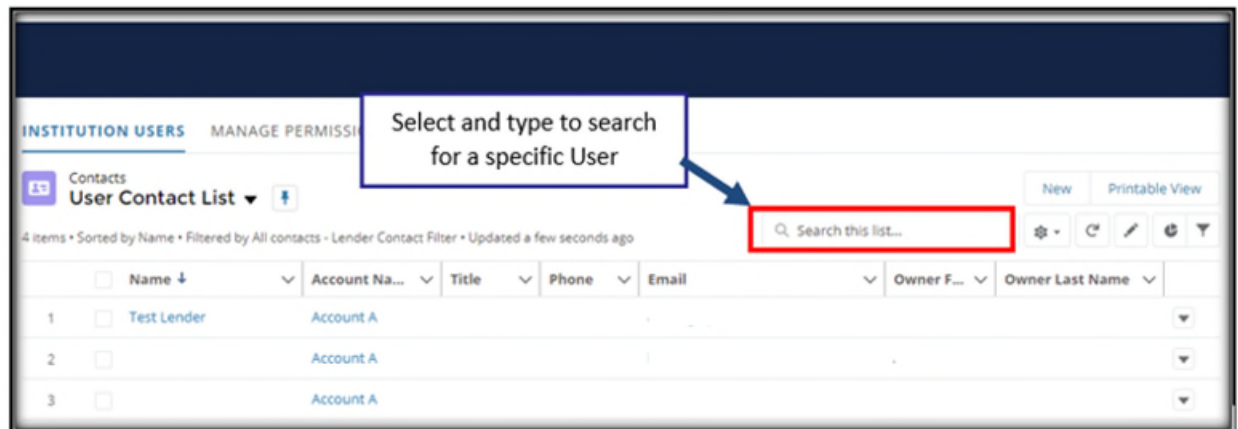


Figure 4: List View Search Bar



7. **To sort User records**, select the name of the column header. The arrow next to the column header name indicates the sort type (ascending or descending).

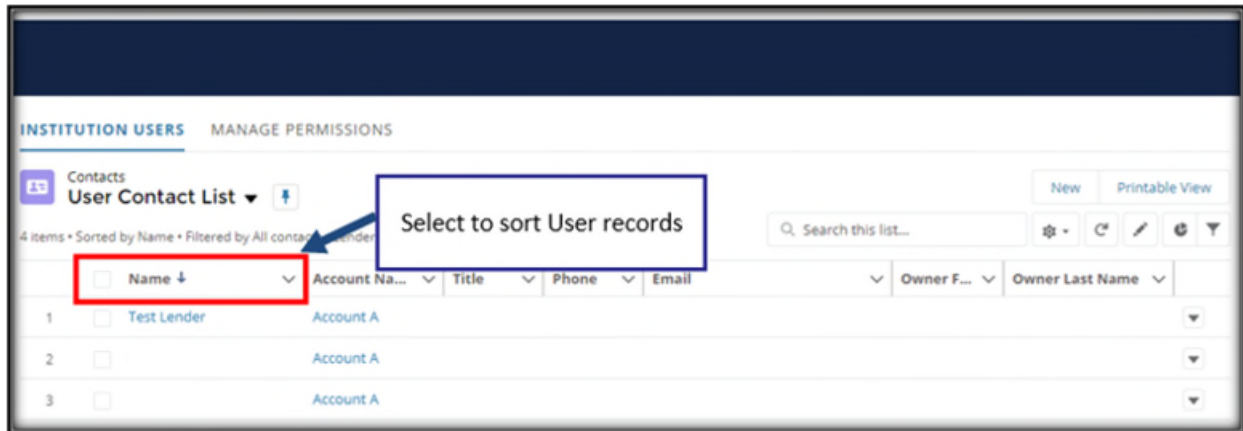
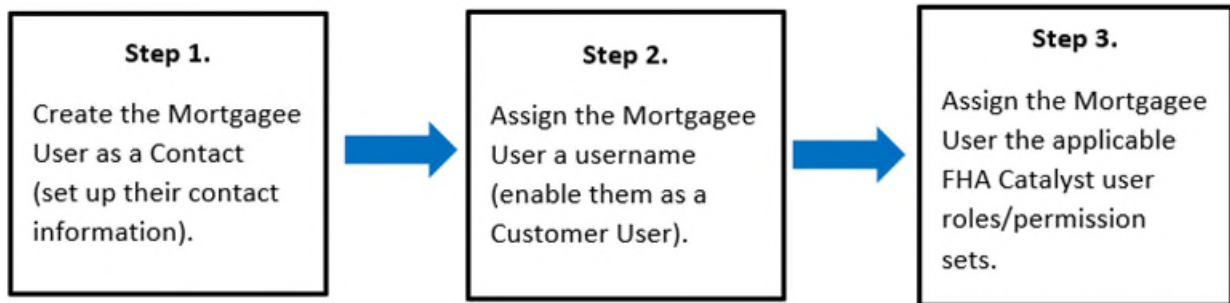


Figure 5: Sorting Columns

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3. Onboarding a new User

This section illustrates how a Mortgagee Administrator onboards a new User for their organization. Creating a new user is a three-step process:



NOTE: If the Mortgagee User already exists within *FHA Catalyst*, then skip to [Section 3.3](#) to assign the **Permission Set** for each individual application.

3.1 Create a new User (Contact) record for the User

1. To onboard a new Mortgagee User, select the **New** button.

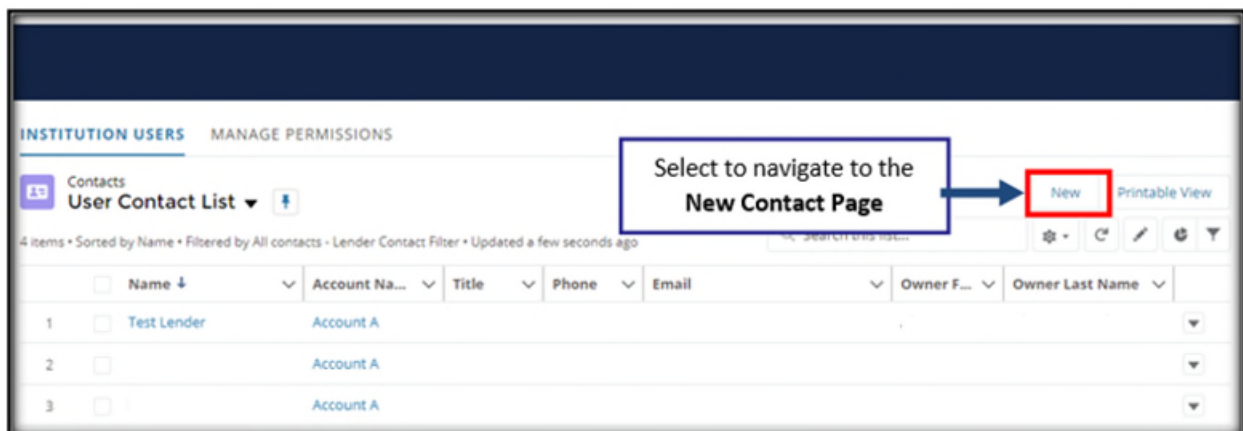


Figure 6: Onboard a New User

2. The New Contact Screen is displayed, which allows the Mortgagee Administrator to enter **Contact Information** for the new Mortgagee User.

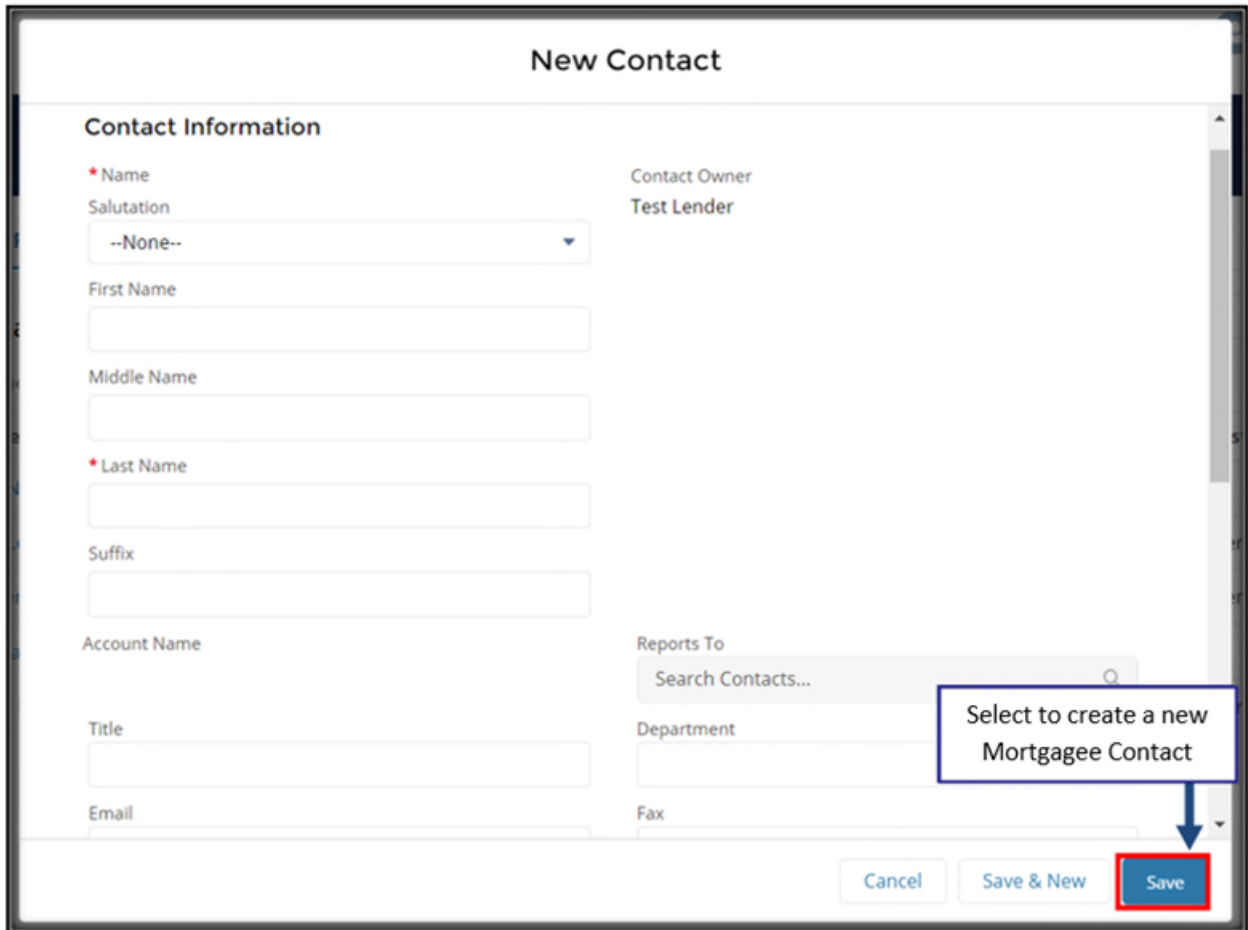


Figure 7: New Contact Screen

3. Enter Contact First Name, Last Name, Email, and other information.
4. Click the **Save** button. To add multiple Mortgagee Users, click the **Save & New** button.
5. After **Save** is selected, the **Mortgagee User** is created as a **New Contact** and you can go to the next step.

3.2 Assign the User a Username to access the *FHA Catalyst* platform

A Mortgagee User must be enabled as a Customer User to access the *FHA Catalyst* platform -- this step creates the credentials which will be associated with the User.

1. Select **Enable Customer User** on **User Contact Page** to create the username for the Mortgagee User and assign the Mortgagee User the applicable *FHA Catalyst* permission sets/roles.

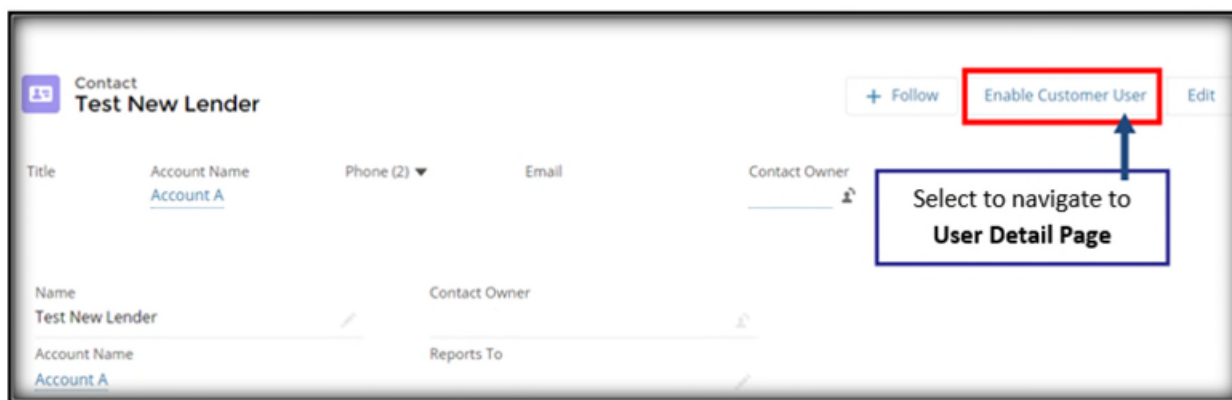


Figure 8: Contact Detail Page

2. Enter the **Email Address, Alias, Username, and Nickname** for the Mortgagee User.
3. **Username Format** – This is the user name that the Mortgagee User will use to log into the platform. It must be unique in the platform. We recommend a format using a unique but easy to remember value, such as an email address but with the suffix of .hud2, as follows:
“email@example.hud2”

Example: example@test.com.hud2

NOTE: At the time the Mortgagee User is emailed their Username, they will also receive a link directing them to set Password.

4. Set the Role to **Customer User**.
5. The Profile should be **HUD Lender Customer Community Plus User Profile**.

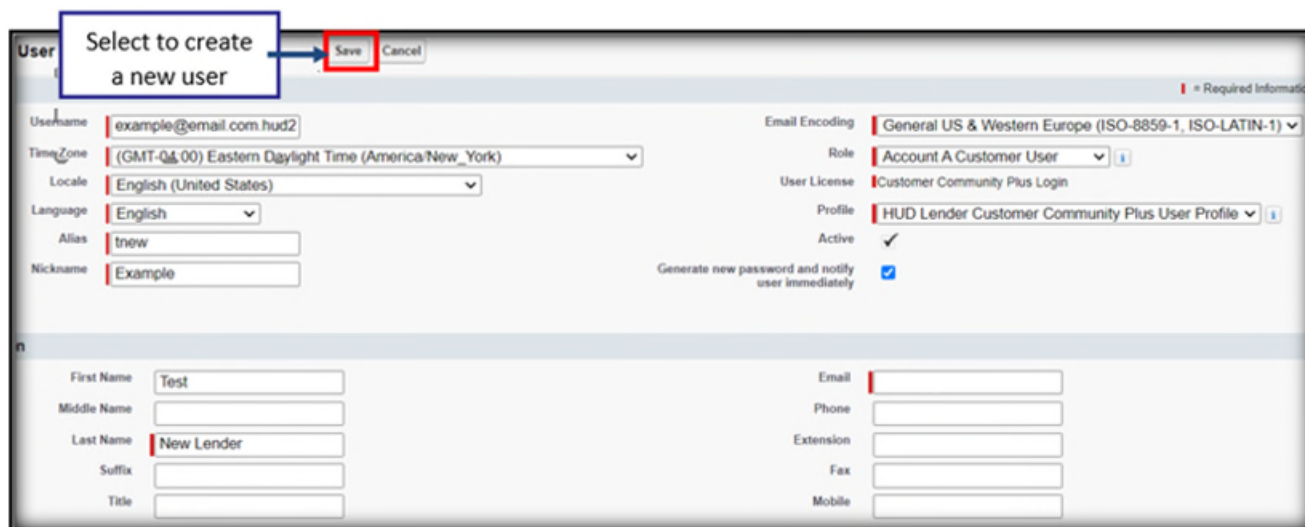


Figure 9: User Detail Page

3.3 Assign the User the applicable Permission Set

After creating the Mortgagee User and assigning them a Username with which to log into the system, a permission set must be added to enable access to the applicable modules in the *FHA Catalyst* platform. To add the Permission Sets to the Mortgagee User:

1. Select **Manage Permissions** Tab
2. On the Manage Permissions Page click **dropdown list of the user** and then click **Manage Permissions**.

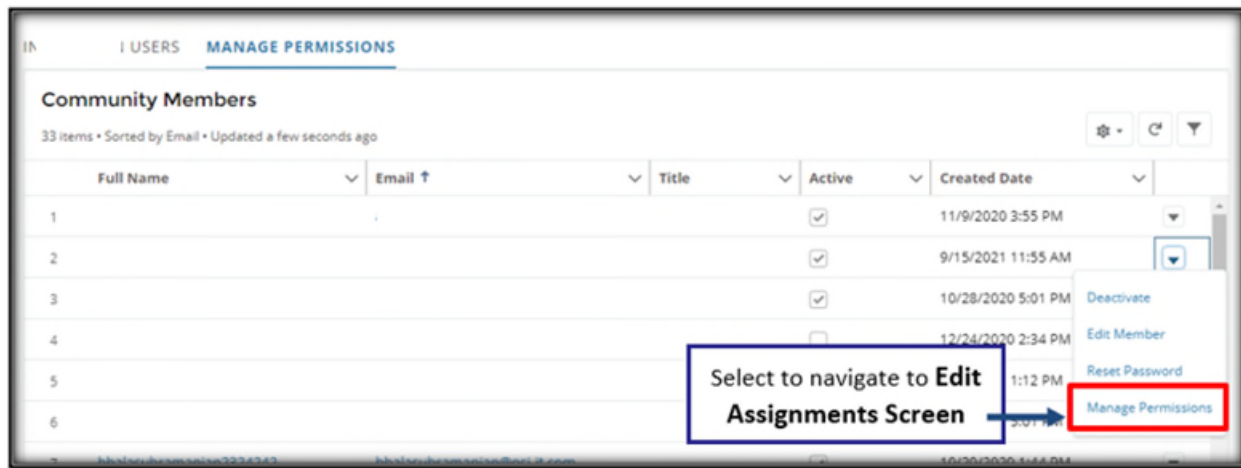


Figure 10: Manage Permissions Page

3. On the **Edit Assignments Screen** select the Permission Set for the application from the **Available Permission Sets** List.
4. Click the **Add >** Button to move the Permission Set to the **Enabled Permission Sets** section.
5. Click the **Save** Button.
6. The new Permission Set is added to the Mortgagee User's account. Please note that certain user roles require the "FHA Catalyst User Access Request Form" to be sent to the FHA Resource Center for access.

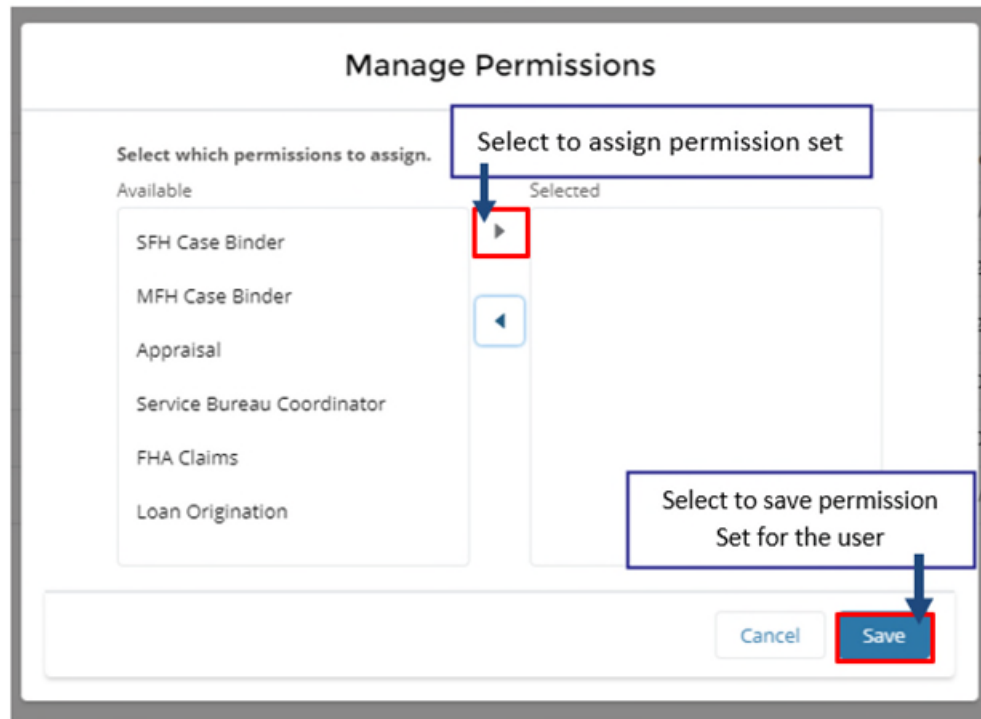


Figure 11: Edit Assignment Screen

Please refer to the table below to assign the Mortgagee User the appropriate permission set for each Module to be given access to:

Module	User Type Description	Permission Set Assignment
Electronic Appraisal Delivery (EAD) (Appraisal)	Authorized to submit EAD appraisals and view previous submissions.	Appraisal
Electronic Appraisal Delivery (EAD) (Appraisal)	Authorized to submit EAD appraisals and capable of seeing all EAD appraisal activities that were submitted by the Lender. Can manage relationships with Appraisal Management Companies.	Appraisal and Service Bureau Coordinator For onboarding AMC users, please use the “ FHA Catalyst User Access Request Form ” on the FHA Catalyst website .



Case Binder	Can submit electronic case binders and only see their submissions of case binder activities	SFH Case Binder
Multifamily Application	Can submit electronic case binders and only see their submissions of case binder activities	MFH Case Binder
Claims	Authorized to submit claims. Can see all claims activity (draft, submitted, rejected, suspended, or paid) under their company.	FHA Claims For onboarding “Claims Submitter” users, please use the “ FHA Catalyst User Access Request Form ” on the FHA Catalyst website .
Loan Origination	Functionality will be available in the future.	Loan Origination

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4. Manage Users

This section illustrates how the Mortgagee Administrator can manage a Mortgagee User in their organization. It includes the following common updates that are made to Users:

- **EDIT CONTACT** - Change Contact information for users in the organization.
- **PASSWORD RESET** - Send a password reset link to an active user.
- **FREEZE/UNFREEZE** - Lock a user out but enable the user to be reinstated later; Reinstates a frozen user to make them active again.
- **DEACTIVATE** - Deactivate the Mortgagee User account.
- **DISABLE CUSTOMER USER** - Permanently disable the Contact level of the Mortgagee User account. Upon disabling the contact, a new contact account will need to be set up if the user needs access in the future.

4.1 Edit Contact information for a Mortgagee User

1. Search for and select the **Name** of the Mortgagee User to review the contact detail.
2. Either select **Edit icon** or **Edit** button to change Contact Information for the Mortgagee User.

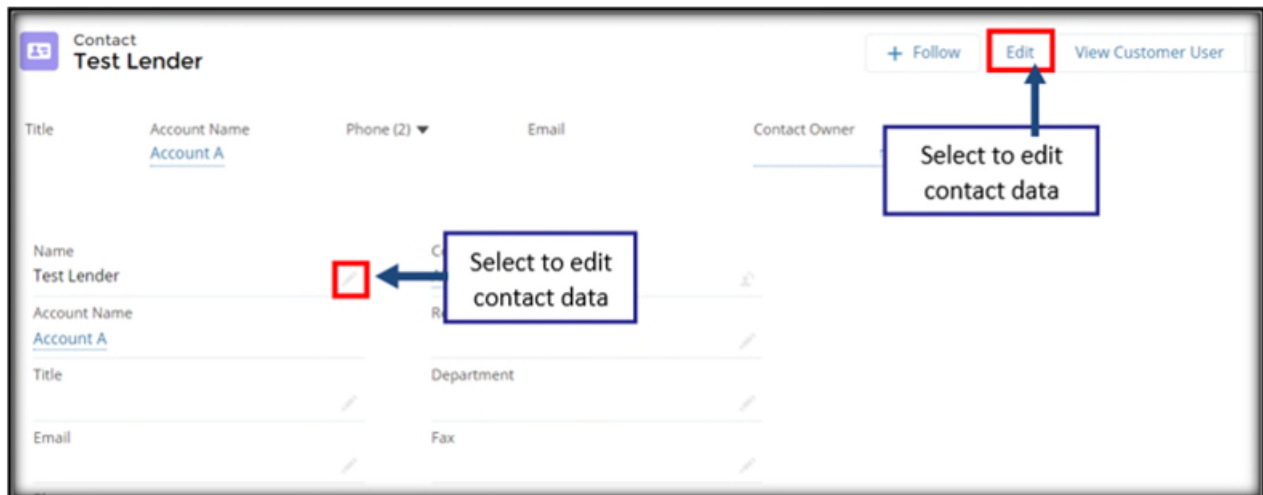


Figure 12: Contact Detail Page

4.2 Reset a Password for a Mortgagee User

Mortgagee Administrators have the ability to reset passwords for Mortgagee Users in their institution. The Mortgagee User **MUST** be in **active status** (not frozen account status) in order to reset their password.

1. On the Manage Permissions Page, sort to find the Mortgagee User by name; once you have confirmed it is the correct user, click on the icon for the **dropdown list of the user** and then click **Reset Password**.

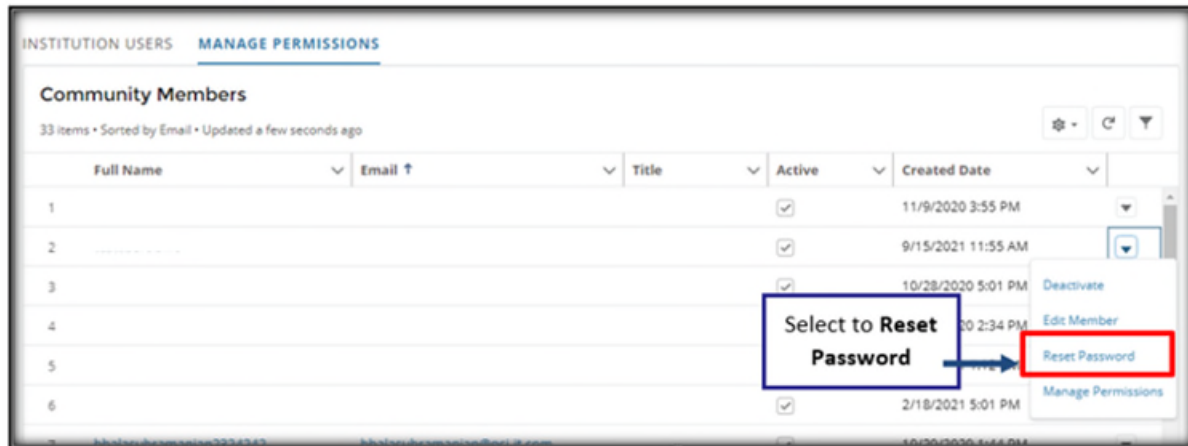


Figure 13: Reset Password

2. Click **Reset Password** on the Pop-Up window to continue.
3. An automated email will be generated for the Mortgagee User to use to reset their password. The Mortgagee User will need to click on the link to reset their password.

NOTE: This link is only valid for 24 hours.

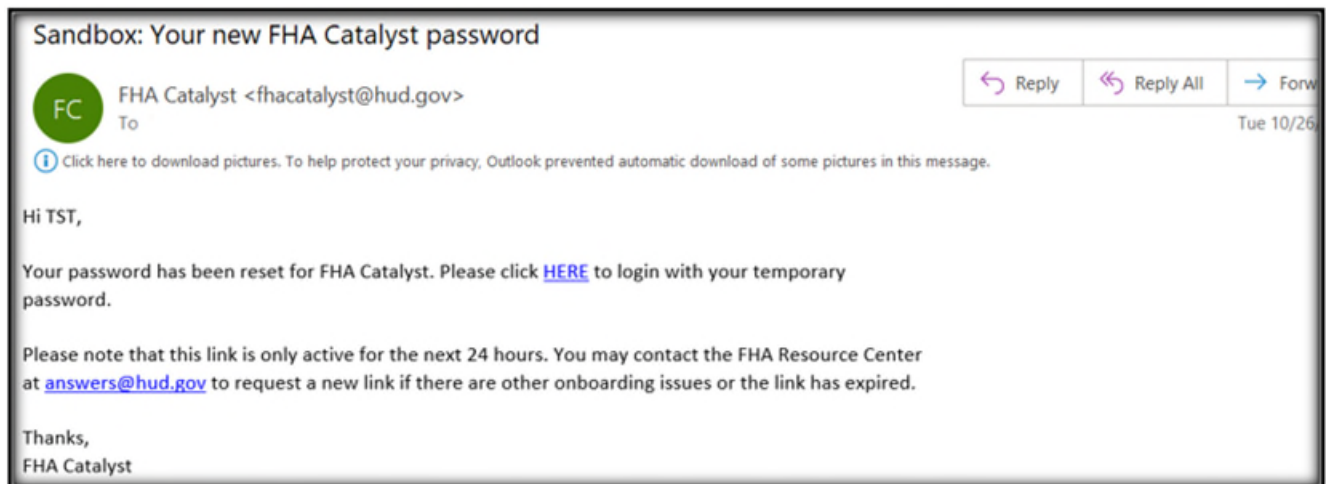


Figure 14: Password Reset Notification Email for Users

4.3 Freeze/Unfreeze a Mortgagee User account

Mortgagee Administrators can suspend a Mortgagee User's account and enable the Mortgagee User to be reinstated later. This can be used to temporarily disable the account or prevent the user from logging in temporarily. This is good for returning users.

A user can be frozen until the prerequisites are completed prior to deactivating the Mortgagee User.
(Please see [Section 4.4](#))

To freeze a Mortgagee User account:

1. On the Manage Permissions Page select appropriate blue hyperlink of **Full Name** of User.
2. Click **Freeze/Unfreeze** button once confirmed it is the correct User.

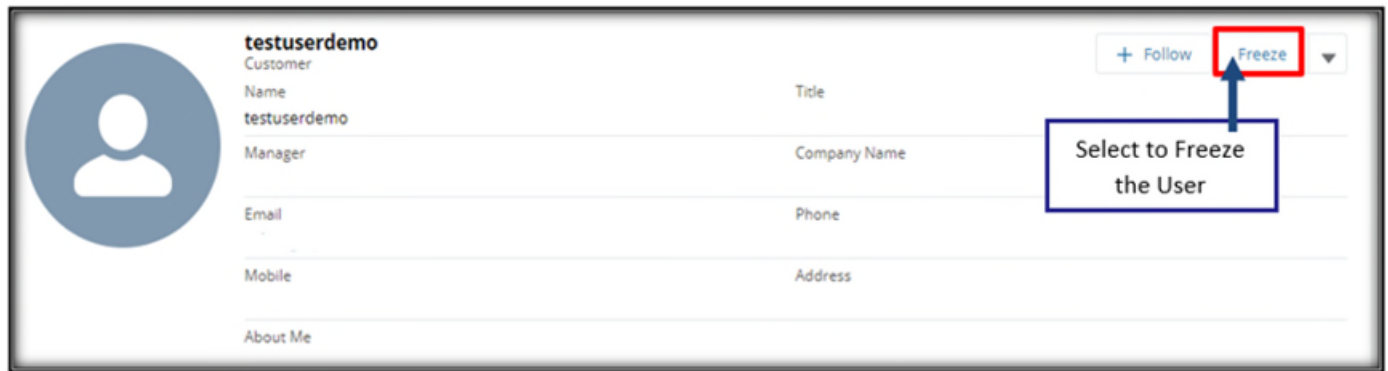


Figure 15: Freeze the Mortgagee User

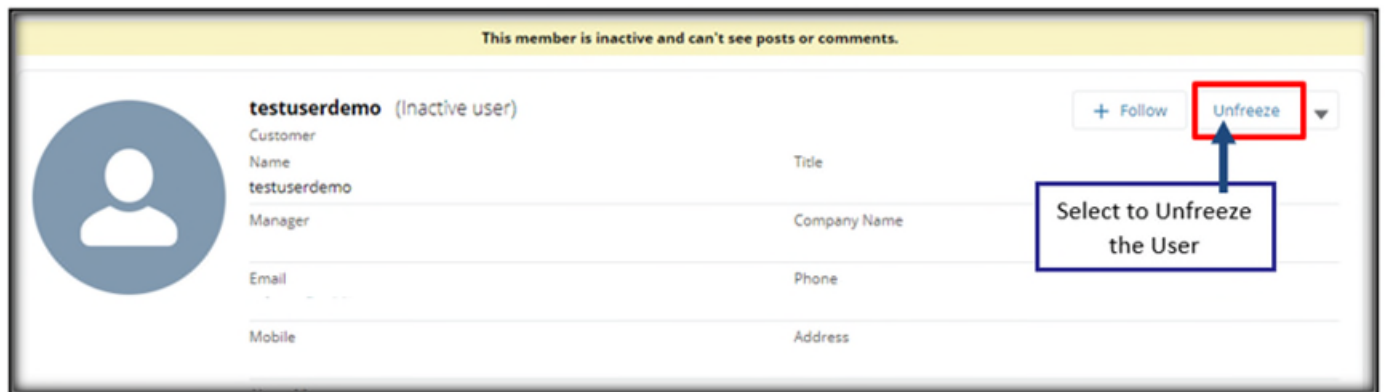


Figure 16: Unfreeze the Mortgagee User

4.4 Deactivate a Mortgagee User Account

The feature is for deactivating a Mortgagee user account. If needed, it is possible to reactivate a Mortgagee user that has been previously deactivated.

There are certain situations in which deactivation is not allowed. Please use the freeze option to prevent the user from logging in, until the following prerequisites can be addressed:

- If there is a case owned by the user, or in-process. These cases must be transferred to another user. Please note that the ability to transfer Case Binders is not available yet to the Mortgagee Administrator role; please contact the FHA Resource Center for assistance to transfer open/in-process Case Binders.
- If the user is set as an approver for certain tasks
- If the user is referenced in custom settings
- If the user is part of an email workflow

To deactivate a Mortgagee User account:

1. On the Manage Permissions Page, sort to find the Mortgagee User by name; once you have confirmed it is the correct user, click on the icon for the **dropdown list of the user** and then click **Deactivate**.

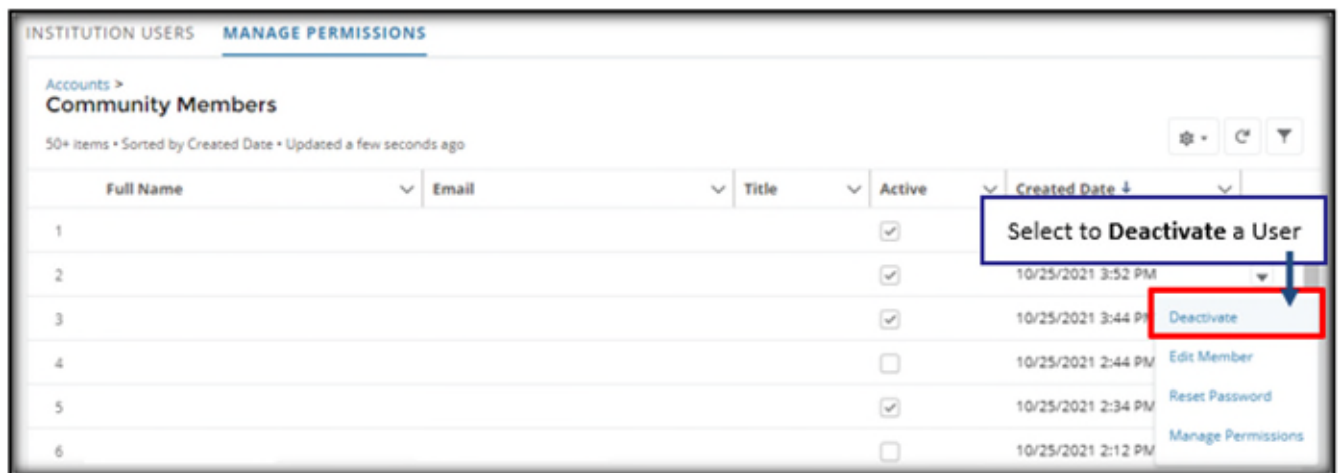


Figure 17: Deactivate a User

To reactivate an inactive Mortgagee User account:

1. On the Manage Permissions Page, sort to find the Mortgagee User by name; once you have confirmed it is the correct user, click on the icon for the **dropdown list of the user** and then click **Activate**.

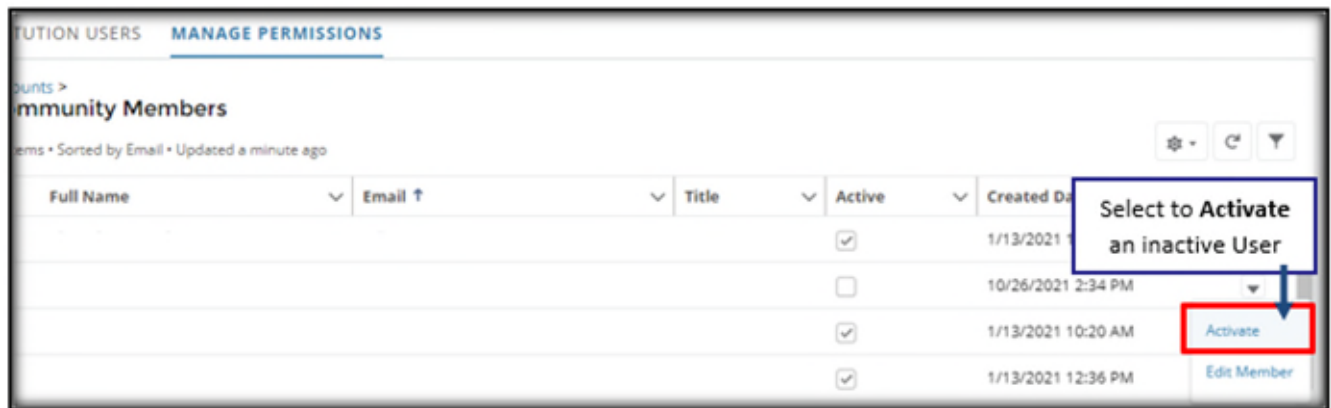


Figure 18: Activate an inactive User

4.5 Disable a Mortgagee User Account

Disabling a Mortgagee user account will permanently disable the Contact and they cannot be reactivated with their original User record. It is not possible to re-enable a disabled User record.

Potential reasons to disable a Mortgagee user are:

- A contact was accidentally enabled as a Mortgagee user.
- The Mortgagee user is associated with a duplicate contact.
- The Mortgagee user will not need access to *FHA Catalyst* in the future.
-

To disable a Mortgagee User account:

1. On the User Institution Page select appropriate blue hyperlink of **Full Name** of User.
2. Click the **Disable Customer User** button once confirmed it is the correct User.

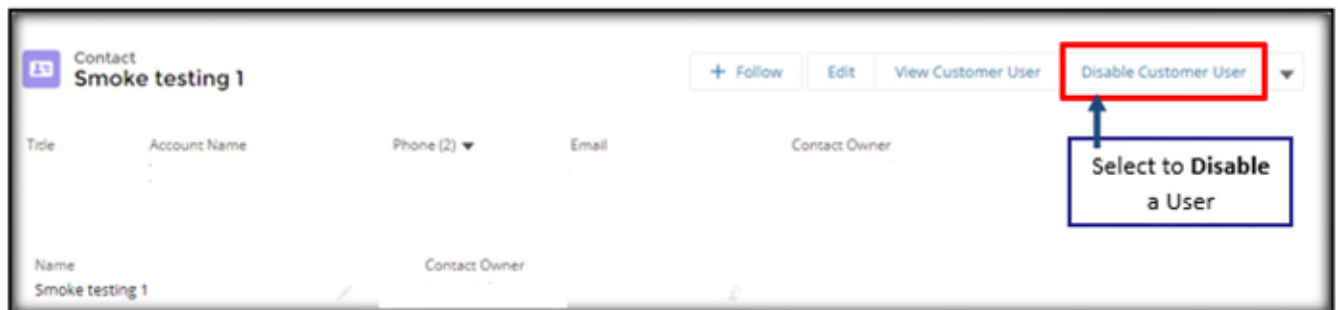


Figure 19: Disable a User

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5. Getting Help

For further assistance, please contact the FHA Resource Center:

- E-mail answers@hud.gov
- Call 1-800-CALLFHA (1-800-225-5342). Persons with hearing or speech impairments may reach this number by calling the Federal Information Relay Service at 1-800-877-8339.
- Emails and phone messages will be responded to during normal hours of operation, 8:00 AM to 8:00 PM (Eastern Standard Time), Monday through Friday on all non-Federal holidays.

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